AvePoint DocAve 6 User Guide

DocAve® 6 Quickr Migrator

User Guide

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The Enterprise-Class **Management Platform** for **SharePoint** Governance

Table of Contents

What's New in this Guide 5

About Quickr Migrator 6

Complementary Products 6

Submitting Documentation Feedback to AvePoint 7

Before You Begin 8

AvePoint's Testing Policy and Environment Support 8

Supported Hardware 8

Supported Backup and Recovery 8

Configurations 9

Agents 9

Required Permissions 9

Required Permissions for the Source 9

Required Permissions for the Destination: Migration to SharePoint On-Premises 10

Required Permissions for the Destination: Migration to SharePoint Online 10

Local System Permissions 12

Forms Based Authentication Permissions 12

Migration Speed Considerations 13

Health Analyzer 13

Getting Started 15

Launching DocAve Quickr Migration 15

Navigating DocAve 16

About Online Migrations 18

Online Migration Overview 19

Pre-migration Configurations 20

Configuring Migration Databases 20

Configuring Quickr Connections 21

Managing Quickr Connections 21

Creating and Editing Quickr Connections 22

Configuring Filter Policies 23

Creating and Editing Filter Policies 23
Configuring Mapping Settings 24
User Mapping 24
Group Mapping 25
Permission Mapping 25
Configuring Dynamic Rules 27
Managing Dynamic Rules 27
Creating and Editing Dynamic Rules 28
Setting Up a Quickr Migration Profile 29
Migration Options 29
Mapping Options 31
Advanced Options 34
Managing Sub-profiles 35
Editing an Existing Sub-profile 35
Deleting an Existing Sub-profile 35
Uploading a Previously Configured Sub-profile 36
Downloading an Existing Sub-profile 36
Performing a Quickr Migration 37
Select the Source and Destination Nodes 37
Creating Containers 38
Configuring the Run Now Interface 40
Configuring the Save As New Plan Interface 40
Configuring the Add Schedule Interface 42
Quickr Migration for SharePoint Online 44
Supported and Unsupported Elements in Quickr Migrator 45
Managing Plans 47
Quickr Migrator Tool 48
Accessing Quickr Migration Hot Key Mode 49
Home Page 49
Migration Database 50
Configure Connection 50
Profile Settings 50

Online Migration 51
Plan Manager Page 51
Appendix A: Quickr Migration Database Information 53
Job Detail 53
Job Notification 56
Job Statistic 57
Appendix B: Quickr Migrator Customization Support Table 61
Appendix C: Quickr Migrator Configuration File 65
QuickrMigrationWorker.xml 65
Appendix D: Conflict Resolution 68
Container Level Conflict Resolution 68
Content Level Conflict Resolution 68
Notices and Copyright Information 70

What's New in this Guide

- Added Required Permissions for the Source.

About Quickr Migrator

DocAve Quickr Migrator provides an efficient and cost-effective solution for the transfer of places, rooms, folders, and pages from Quickr to Microsoft SharePoint 2010, SharePoint 2013, and SharePoint Online. DocAve allows SharePoint administrators to easily automate the process of consolidating multiple Quickr content sources into SharePoint, therefore, maximizing return on investment in legacy content residing in Quickr.

Quickr Migrator allows organizations to:

- **Streamline the data transfer easily** from Quickr to SharePoint
- **Preserve and map all associated metadata and security settings** of Quickr content during the migration
- **Plan migration jobs according to business needs** with granular or bulk content migration and customizable job scheduling

To ensure a complete and successful Quickr migration, DocAve's Pre-Migration Scanner provides a detailed analysis of the migration before it is performed. The DocAve Pre-Migration Scanner will detect and notify you of any illegal characters, user permissions, user names, user domains, and other legacy elements that must be mapped in order to migrate successfully into SharePoint.

Organizations can further minimize business disruption and time-to-value by leveraging AvePoint Partner Services (APPS) to perform detailed data analysis, content and application migrations, and post-migration verifications.

As with all AvePoint software, our SharePoint Migration tools leverage only fully supported Microsoft methodologies and APIs.

Complementary Products

Many products and product suites on the DocAve 6 platform work in conjunction with one another. The following products are recommended for use with DocAve Quickr Migrator:

- DocAve Content Manager for SharePoint for restructuring or moving SharePoint content.
- DocAve Report Center for SharePoint to examine pain points in the SharePoint infrastructure and report on SharePoint user behavior and changes.
- DocAve Data Protection for setting backup and recovery points prior to adjusting SharePoint governance policies in this product.
- DocAve Replicator to perform live or event-driven, as well as scheduled or offline replication. Synchronization and management of all content, configurations, and securities is performed with full fidelity.

Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. You can Submit Your Feedback on our website.

Before You Begin

Refer to the sections for system and farm requirements that must be in place prior to installing and using DocAve Quickr Migrator.

AvePoint's Testing Policy and Environment Support

Supported Hardware

AvePoint is committed to maintaining a hardware agnostic platform to ensure that DocAve operates on common Windows file sharing and virtualization platforms. To ensure that DocAve is hardware agnostic, AvePoint tests hardware that is intended to support SharePoint and DocAve infrastructure, storage targets, and hardware-based backup and recovery solutions, as supported by AvePoint's partnerships. AvePoint directly integrates with the following platforms: any Net Share, IBM Storwize Family, FTP, Amazon S3, AT&T Synaptic, Caringo Storage, Del DX Storage, EMC Centra, HDS Hitachi Content Platform, Rackspace Cloud Files, TSM, and Windows Azure Storage.

All other hardware platforms that support UNC addressable storage devices are supported.

***Note:** Most of the hardware partnerships referenced in this guide are intended to make use of advanced functionality (such as snapshot mirroring, BLOB snapshots, indexing, long-term storage, WORM storage, etc.), and are not indications that any changes to the product are required for basic support. In most cases, hardware can be supported with no change to the product.

Supported Backup and Recovery

DocAve supports BLOB backup storage according to the list of hardware platforms above. BLOB snapshot functionally, however, is currently only supported on OEM versions and NetApp hardware.

DocAve supports SQL content and Application database backups via the SharePoint Volume Shadow Copy Service (VSS) on all Windows and SQL server platforms listed above. DocAve also supports snapshot-based SharePoint VSS on all hardware listed above where the hardware partner has certified support with Microsoft.

DocAve supports application and configuration server backups for all the supported software environments listed above. DocAve 6 supports VM backup via Hyper-V/VMWare for the following operating systems: Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2, and Microsoft Hyper–V Server 2012 R2.

Configurations

In order to use DocAve Quickr Migrator, the DocAve 6 platform must be installed and configured properly on your farm. DocAve Quickr Migrator will not function without DocAve 6 present on the farm.

To review a list of migration source versions and systems supported by DocAve Migrator, refer to Appendix C: Migration Source Environment in the DocAve 6 Installation Guide.

Agents

DocAve Agents are responsible for running DocAve jobs and interacting with the SharePoint object model. DocAve Agents enable DocAve Manager to communicate with the respective servers, allowing for DocAve Quickr Migrator commands to function properly.

***Note:** The use of system resources on a server increases when the installed agent is performing actions. This may affect server performance; however, if the agent installed on a server is not being used, its system resource needs are very low.

For instructions on installing the DocAve Platform, DocAve Manager, and DocAve Agents, see the DocAve 6 Installation Guide.

Required Permissions

To install and use DocAve Quickr Migrator properly, ensure that the following permissions are met.

Required Permissions for the Source

Before using DocAve Quickr Migrator, ensure the DocAve Agent account in the source has the following permissions:

1. Local System Permissions: If there are no strict limitations within your organization on the permissions that can be applied, add the source **DocAve Agent Account** to the local **Administrators** group. Otherwise, ensure the source Agent account has the following permissions:
    - Full Control permission to the Lotus Notes installation directory.
    - Full Control permission to the Quickr installation directory.
    - The permissions listed in Local System Permissions.
2. Quickr Permissions: Have the Manager role for all Quickr places that will be migrated.

Required Permissions for the Destination: Migration to SharePoint On-Premises

Before using Quickr Migrator for SharePoint on-premises, ensure that the destination Agent account has the following permissions:

1. Local System Permissions: The permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.
2. SharePoint Permissions: These permissions must be manually configured prior to using DocAve 6 Quickr Migrator; they are not automatically configured.
    - Member of the Farm Administrators group
        - Full Control to all zones of all Web applications via User Policy for Web applications
        - Managed Metadata Service – Term Store Administrator
    - Other permissions required
        - Managed Metadata Service – Full Control
        - Managed Metadata Service – Administrator
3. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 Quickr Migrator; they are not automatically configured.
    - Member has a Database Role of **db_owner** for all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database
    - Member has a Database Role of **db_owner** for Migration Database
    - Member has a Server Role of **dbcreator** to SQL Server

    ***Note:** If forms based authentication (FBA) is selected as a Web application's claims authentication type, refer to Forms Based Authentication Permissions to configure additional settings for the Web application.

Required Permissions for the Destination: Migration to SharePoint Online

Before using Quickr Migrator for SharePoint Online, ensure that the following permissions are met:

Local System Permissions for Agent Account

For the registered SharePoint Online site collections, the Agent account is on the Agent machine that will run migration jobs. This machine must have a network connection or have configured Agent Proxy Settings. For more information about Agent Proxy Settings, refer to the DocAve 6 Control Panel Reference Guide.

For the registered SharePoint on-premises site collections, the Agent account is on the Agent machine that will run migration jobs. This machine must be the Central Administration server, one of the Web front-end servers of the farm where the registered site collections reside, or a machine that can communicate with the Central Administration server or one of the Web front-end servers.

The Agent account must have proper Local System permissions. These permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

***Note**: The source Agent account must have the Full Control permission to Lotus Notes installation path.

Required Permissions for the User Used to Register SharePoint Online Site Collections

To register SharePoint Online site collections in **Control Panel** > **Registered SharePoint Sites** > **Manual Input Mode**, the user must have the following permissions to each site collection:

- Full Control permission to the site collection
- Managed Metadata Service – Term Store Administrator
- Other permissions required
    - Managed Metadata Service – Full Control
    - Managed Metadata Service – Administrator

***Note**: If the site collections are registered in **Scan Mode**, make sure the user has the Global Administrator role in Office 365.

Required Permissions for the User Used to Register SharePoint On-Premises Site Collections

The user that is used to register SharePoint on-premises site collections in **Control Panel** > **Registered SharePoint Sites** > **Manual Input Mode** must have the following permissions to each site collection:

- User is a member of the **Site Collection Administrator** group.
    - Managed Metadata Service – Term Store Administrator
- Other permissions required
    - Managed Metadata Service – Full Control
    - Managed Metadata Service – Administrator

***Note**: If the site collections are registered in **Scan Mode**, make sure the user has the Full Control permission to all zones of all Web applications via User Policy for Web Applications.

Local System Permissions

The following Local System Permissions are automatically configured during DocAve 6 installation:

- User is a member of the following local groups:
  - IIS WPG (for IIS 6.0) or IIS IUSRS (for IIS 7.0)
  - Performance Monitor Users
  - DocAve Users (the group is created by DocAve automatically; it has the following permissions):
    - Full Control to the Registry of HKEY_LOCAL_MACHINE\SOFTWARE\AvePoint\DocAve6
    - Full Control to the Registry of HKEY_LOCAL_MACHINE\System\CurrentControlSet\Services\eventlog
    - Full Control to the Communication Certificate
    - Permission of Log on as a batch job (it can be found within Control Panel > Administrative Tools > Local Security Policy > Security Settings > Local Policies > User Rights Assignment)
    - Full Control to DocAve Agent installation directory

Forms Based Authentication Permissions

If forms based authentication (FBA) is selected as a Web application's claims authentication type, ensure at least one of the following conditions is in place:

- The Agent account must be a member with the Database Role of **db_owner** for the FBA database.
- Add the Agent account in the **connectionStrings** node in this Web application's **web.config** file to make the Agent account have permission to the FBA database. For details, refer to the instructions below:
  i. Navigate to **Start** > **Administrative Tools** > **Server Manager** > **Roles** > **Web Server (IIS)** > **Internet Information Services (IIS) Manager**, find the desired Web application in the **Sites** list.
  ii. Right-click the Web application and select **Explore**.
  iii. A window pops up and you can find the **web.config** file in it.
  iv. Open the **web.config** file with Notepad.
  v. Find the **connectionStrings** node and specify a user that has access to the database that stores FBA security information.

Migration Speed Considerations

Speed is a very important factor when migrating content. To estimate how long your migration plans will take, in order to better inform stakeholder, the following key factors should be taken into consideration prior to running your migration plans.

- Network bandwidth between the two SharePoint environments
- SQL I/O and memory
- Memory on Web front-end servers
- Memory on the server hosting the DocAve Media service
- Number of CPUs on Web front-end servers
- Source environment deployment
    - Number of objects in source
        - Divide database and folder structures into small data sets before running the migration. Consider a granular migration approach.
    - Size of objects in source
        - A single 1 GB file will migrate far quicker than a million files that have a sum of 1 GB.
    - Complexity of folders and sites
        - Prioritize content to be migrated into SharePoint, and utilize tools to establish co-existence throughout the course of the migration project to slowly roll-out SharePoint to users as their content becomes available.
    - Whether DocAve has to create site collections during migration
        - Use folders to break up large document libraries or data subsets to manage library size, consider utilizing filtering to migrate a sub-set of the data at a time.
    - Whether securities are included in the plan (including mappings)
        - Permissions can be configured to be migrated in the migration plans.
    - Whether metadata is included in the plan

Health Analyzer

AvePoint recommends using Health Analyzer to check the prerequisites you need to correctly use DocAve Quickr Migration.

***Note**: Only the users in the DocAve **Administrators** group can use Health Analyzer.

***Note**: When creating Health Analyzer profiles, DocAve Quickr Migration recommends creating two different profiles to scan the source Agent and the destination Agent separately.

After selecting Quickr Migration as the module, all of the scan rules are selected by default, including the rules for the source environment and the rules for the destination environment. When the Health Analyzer job is finished, you can view the Health Analyzer results. If the scan rule is for the destination environment, but it is applied on the source environment, ignore the error or warning, and vice versa.

For more information about Health Analyzer, refer to the DocAve 6 Installation Guide.

Getting Started

Refer to the sections below for important information on getting started with DocAve Quickr Migration.

Launching DocAve Quickr Migration

To launch Quickr Migration and access its functionality, follow the instructions below:

1. Log into DocAve. If you are already in the software, click the **DocAve** tab. The **DocAve** tab displays all product suites on the left side of the window.
2. Click **Migration** to view all of the Migration modules.
3. Click **Quickr Migration** to launch that module.

   ***Note:** If desired, access the **License Details** information for Migrator products from the **Migration** landing page.

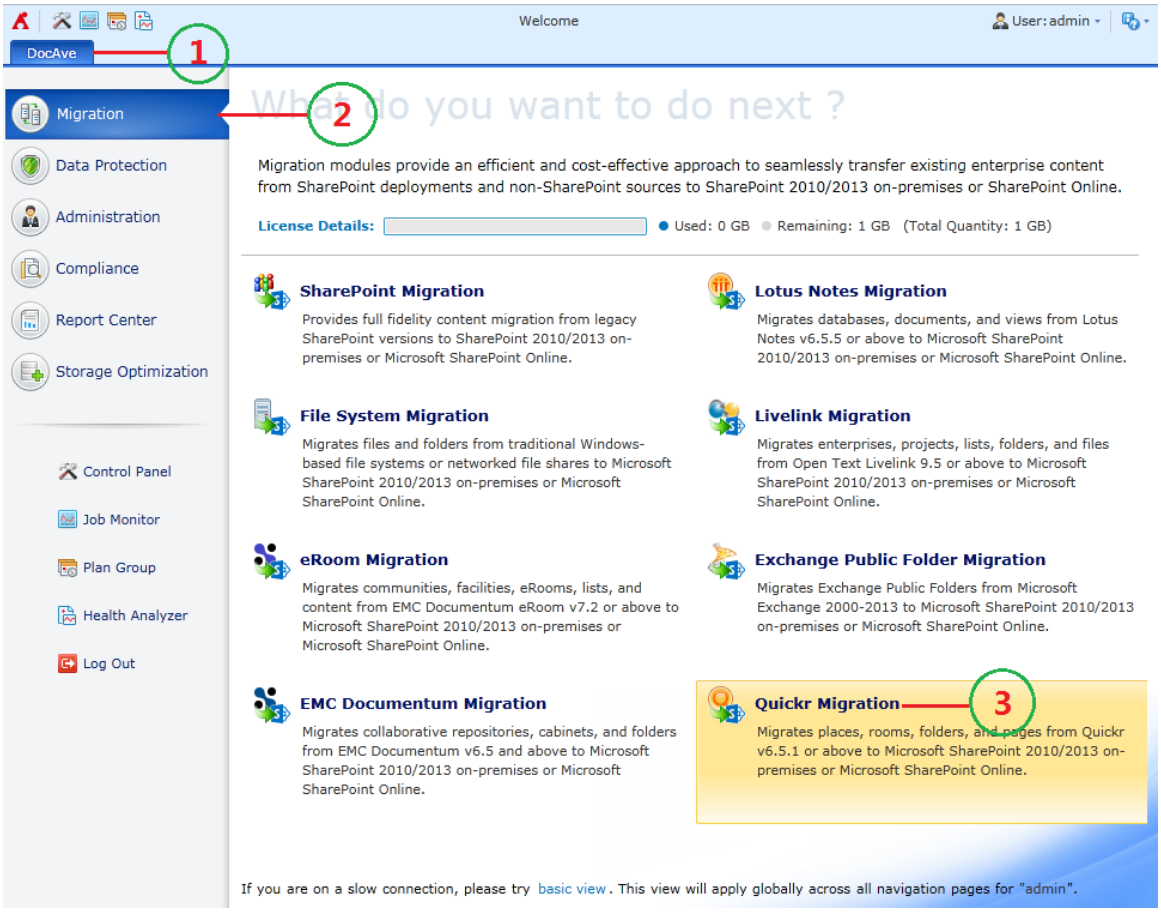


Figure 1: DocAve Quickr Migration launch window.

Navigating DocAve

DocAve mimics the look and feel of many Windows products, making for an intuitive and familiar working environment. While there are many windows, pop-up displays, and messages within DocAve products, they share similar features and are navigated in the same ways.

Below is a sample window in DocAve. It features a familiar, dynamic ribbon, and a searchable, content list view.

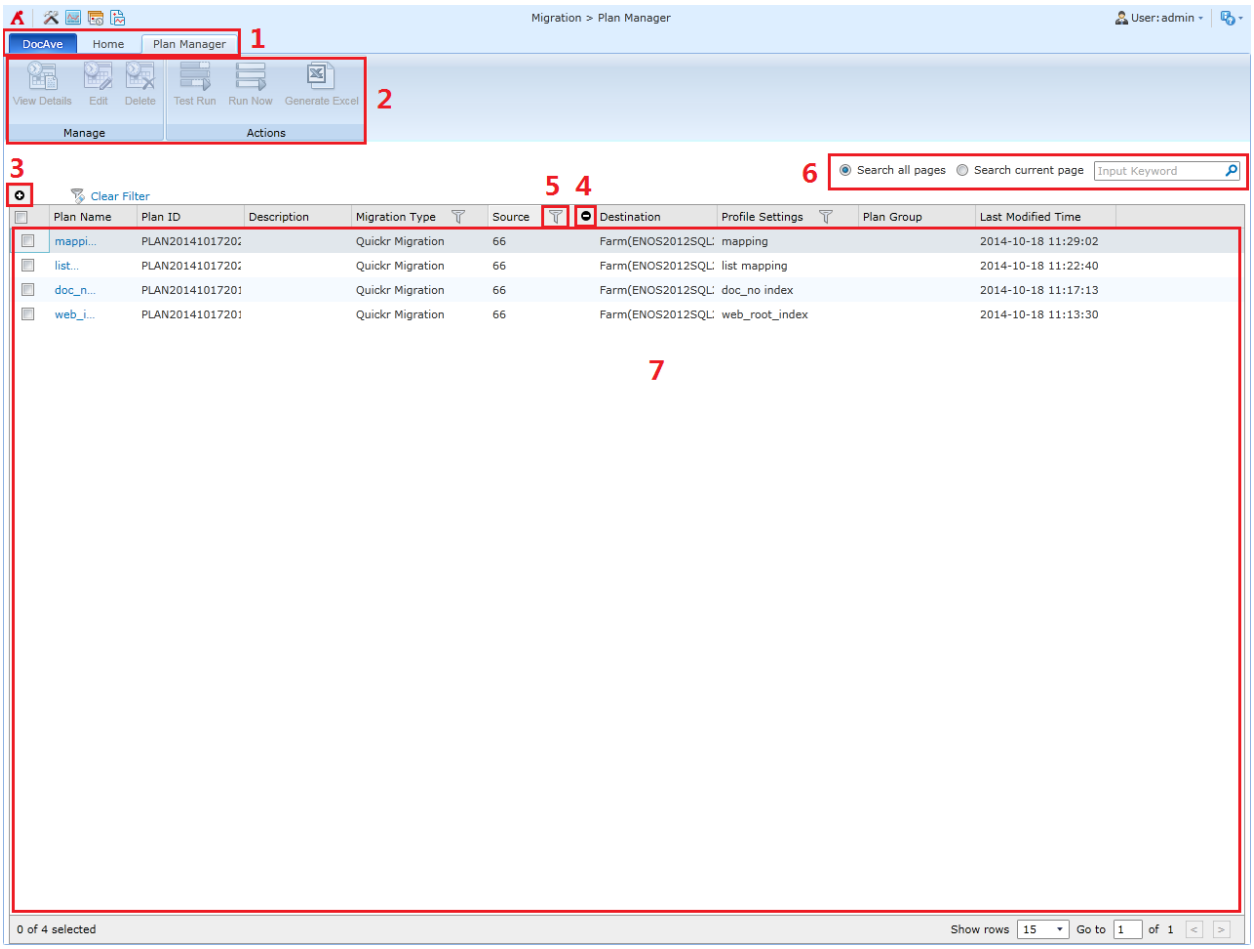


Figure 2: Navigating DocAve.

1. Ribbon Tabs – Allows users to navigate to the DocAve Welcome page and within the active DocAve modules.
2. Ribbon Panes – Allows users to access the functionality of the active DocAve module.
3. Manage columns (⊕) – Allows users to manage which columns are displayed in the list. Click the manage columns (⊕) button, and then select the checkboxes next to the column names in the drop-down list.
4. Hide the column (⊖) – Allows users to hide the selected column.

5. Filter the column ( ) – Allows users to filter the information in the List View. Click the filter the column ( ) button next to the column and then select the checkbox next to the column name.
6. Search – Allows users to search the List View pane for a keyword or phrase. You can select **Search all pages** or **Search current page** to define the search scope.

   ***Note:** The search function is not case sensitive.

7. Management Pane – Displays the actionable content of the DocAve module.

About Online Migrations

An Online Migration job migrates content, configurations, securities, and metadata from a source Quickr environment to a destination SharePoint environment when a network between the source and destination is available.

Online Migration Overview

To perform Online Migration jobs, the following steps must be performed in this order. Click the link to navigate to the corresponding section.

1. Pre-migration Configurations
    - Configuring Migration Databases
    - Configuring Quickr Connections
    - Configuring Filter Policies (Optional)
    - Configuring Mapping Settings (Optional)
    - Configuring Dynamic Rules (Optional)
2. Setting Up a Quickr Migration Profile
    a. Migration Options
    b. Mapping Options
    c. Advanced Options
    d. Managing Sub-profiles
3. Performing a Quickr Migration
    a. Select the Source and Destination Nodes
        - Creating Containers
    b. Select one of the following methods to perform an online migration
        - Configuring the Run Now Interface
        - Configuring the Save As New Plan Interface

Pre-migration Configurations

Configure the following settings before performing Quickr migration. Click the link to navigate to the corresponding section.

- Configuring Migration Databases
- Configuring Quickr Connections
- Configuring Filter Policies (Optional)
- Configuring Mapping Settings (Optional)
- Configuring Dynamic Rules (Optional)

Configuring Migration Databases

In order to use Quickr Migrator, you must configure a dedicated migration database to store links and detailed job information in SQL for every farm that will be using Quickr Migration. For detailed information on the Migration database schema, refer to Appendix A: Quickr Migration Database Information.

***Note:** The version of SQL Server required to create a migration database must be SQL Server 2005 SP1 or higher.

1. On the **Home** tab, in the **Settings** group, click **Migration Database**. The **Migration Database** page appears.
2. Select the **farm** or **My Registered Sites** that will be using Quickr Migration. Each farm or My Registered Sites using Quickr Migration requires the following steps.
3. Click **Configure** in the **Manage** group. The **Configure** page appears.
4. Configure the following settings for the database that will store migration job data:
    a. **Configure Migration Database** –Specify a migration database. Enter a new **Database Server** and a **Database Name** in the corresponding fields.
    b. **Authentication** – Select the authentication mode for the migration database.
        - **Windows Authentication** (recommended) – Select this mode to verify the user's identity by Windows.
            - By default, the **Specify a Window account** checkbox is deselected and DocAve will create a new migration database or access the existing migration database using the destination DocAve Agent account.
            - To access the database server with a specified Windows account, select the **Specify a Windows account** checkbox and select a managed account profile from the **Managed Account Profile** drop-down list or click **New Managed Account Profile** to create a new managed account

profile in Control Panel. Then, click **Validation Test** to validate the account. For more information, refer to the DocAve 6 Control Panel Reference Guide.

- **SQL authentication** – Select this mode to verify the user's identity by SQL Server. Enter the user's account and password in the **Account** and **Password** fields. You can also validate the SQL database account by clicking **Validation Test**.

  ***Note**: The specified account for creating or accessing the migration database must have a server role of **db_creator** for the SQL server where you want to create the migration database and have a database role of **db_owner** for the newly created/existing migration database.

c. **Failover Database Server** (optional) – Specify a failover database server. In the event that the migration database collapses, the data stored in the migration database will be transferred to this standby database.

Alternatively, you can specify a Migration Database in the **Advanced** settings by entering a connection string instead of configuring the settings in Step 4.

a. Click **Advanced**; the **Connection String** section appears.

b. Select the **Edit Connection String directly** checkbox to activate this feature.

c. Enter the connection string according to the example listed in the left pane.

   For more information about how to configure the connection string, refer to the **ConnectionString** property in **SQL Server Books Online** or **SQL Server Tutorials** by navigating to **Start** > **Microsoft SQL Server** > **Documentation and Tutorials**.

d. Click **Validation Test** to test the connection.

5. Click **Save** to finish and save the configuration, or click **Cancel** to return to the **Migration Database page** without saving any configurations.

To view the configuration details of a migration database, select the migration database and click **View Details** on the ribbon in the **Migration Database** page. The detailed configurations are displayed in the **View Details** interface.

Configuring Quickr Connections

To use Quickr Migrator, you must first configure the Quickr Migration connection so that the DocAve Agents can connect to the Quickr Servers. In the **Home** tab, click **Configure Connection** on the ribbon. The **Quickr Connection** interface appears.

Managing Quickr Connections

The Quickr Connection interface displays any Quickr connections that you have previously created.

In this interface, you can change the number of Quickr connections displayed per page and the order in which they are displayed. To change the number of Quickr connections displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the Quickr connections, click on a column heading such as **Name**, **Agent, Notes .INI File Path, and Last Modified Time**.

Perform the following actions in the **Quickr Connection** interface:

- **Create** – Click **Create** on the ribbon to create a new Quickr connection. For details on creating a new Quickr connection, see Creating and Editing Quickr Connections.
- **View Details** – Click **View Details** on the ribbon and you will see the previously configured settings for this Quickr connection. Here you can also click **Edit** on the ribbon to make changes to the Quickr connection's settings. You will be brought to the **Edit Quickr Connection** interface where you can change this Quickr connection.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this Quickr connections. For details on editing configurations for a Quickr connection, see Creating and Editing Quickr Connections.
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected Quickr connections, or click **Cancel** to return to the **Quickr Connection** interface without deleting the selected Quickr connections.

Creating and Editing Quickr Connections

To create a new Quickr connection, click **Create** on the ribbon. To modify a previously configured Quickr connection, select the Quickr connection, and then click **Edit** on the ribbon.

In the **Create Quickr Connection** or **Edit Quickr Connection** interface, configure the following settings.

1. **Name and Description** – Enter a name for the Quickr connection. Then enter an optional description for this Quickr connection for future reference.
2. **Connection** – Configure the following settings to connect the Quickr Server to the source DocAve Agent.
    a. **Agent** – Select a DocAve Agent installed in Quickr environment from the drop-down list.
    b. **NOTES.INI configuration file path** – NOTES.INI file can be found in the Quickr server. The default path *C:\Program Files\lotus\notes\notes.ini* is entered automatically. You can also enter the path by yourself, but make sure that the path you enter is the full path where NOTES.INI file is located.
    c. **User ID file** – Click **here** link which is in the sentence below **NOTES.INI configuration file path** to load the user ID file, then select one from the drop-down list.
    d. **Password** – Enter the password of the user that you have selected in User ID file.

e. **Quickr Version** – Select the version of your Quickr from the drop-down list. Click the **Validation Test** button to check the password.

3. Click **Save** to save the configurations and return to the **Quickr Connection** interface, or click **Cancel** to return to the **Quickr Connection** interface without saving any changes.

Configuring Filter Policies

Filter Policy allows you to set up filter rules so that you can control what pages within Quickr appear, and you can target content more precisely. By setting up and saving filter policies, you can apply the same filter policies to different Quickr migration plans without having to recreate them each time.

To access Filter Policy, click **Profile Settings** on the ribbon in the **Home** tab. On the **Profile Settings** page, click **Filter Policy** on the ribbon.

The **Filter Policy** interface displays any filter policies that you have previously configured.

In this interface, you can change the number of filter policies displayed per page and the order in which they are displayed. To change the number of filter policies displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the filter policies, click on a column heading such as **Filter Policy Name**, and **Description**.

Perform the following actions in the **Filter Policy** interface:

- **Create** – Click **Create** on the ribbon to create a new filter policy. For details on creating a new filter policy, see Creating and Editing Filter Policies.
- **View** – Click **View** on the ribbon to view detailed settings of a selected filter policy.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this filter policy. For details on editing configurations for a filter policy, see Creating and Editing Filter Policies.
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected filter policies, or click **Cancel** to return to the **Filter Policy** interface without deleting the selected filter policies.

Creating and Editing Filter Policies

To create a new filter policy, click **Create** on the ribbon. To modify a previously configured filter policy, select the filter policy, and then click **Edit** on the ribbon.

In the **Create Filter Policy** or **Edit Filter Policy** interface, configure the following settings:

1. **Name** – Enter a **Name** for this filter policy.
2. **Description** – Enter an optional **Description** for future reference.

3. **Filter Rule** – A filter rule allows you to filter pages that you want to migrate by setting up a set of filter criteria. Follow the steps below to set up your own filter rules.

    a. Click **Add a Filter Level Group** to create a **Time Range** filter level. The default rule is **Created Time** and you can select **Modified Time** from the drop-down list.

    b. In the **Condition** column, time condition can be selected from **Before**, **After**, **Within**, and **Older Than**. Set up Time Zone and the exact time in the **Value** column.

    c. Click the delete ( ) button to delete one or more selected filter rules.

    d. You can change the logical relationship between filter rules. There are two types of logic: **And** and **Or**. By default, the logic is set to **And**.

        - **And** – The content which meets all the filter rules will be filtered to be included.
        - **Or** – The content which meets any one of the filter rules will be filtered to be included.

    Basic Filter Conditions – View the logical relationship of the filter rules in this area.

4. Click **Save** to save the configurations and return to the **Filter Policy** interface, or click **Cancel** to return to the **Filter Policy** interface without saving any changes.

Configuring Mapping Settings

Before performing a Quickr migration job, you may want to define User Mapping, Group Mapping, Permission Mapping, and Dynamic Mapping. Refer to the following sections to decide whether to configure the mapping settings, and learn how to configure the mapping settings.

User Mapping

User mapping maps an existing source node user to SharePoint user in the destination. During migration, Migrator will replace the source username with your specified username in the destination.

To access User Mapping, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **User Mapping** on the ribbon. The **Control Panel** appears.

For specific instructions on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide. Make sure that the source username that you input in the column of **Source Username** is in the following format:

- username/orgname
- username/orgname/orgname
- username/orgname/orgname/orgname

The organization in Quickr can be multilevel and here the orgname you enter can also be multilevel.

Group Mapping

Use group mapping to map an existing source group name to a SharePoint group. During the migration, Migrator will replace the source group name with your specified group name in the destination node.

To access Group Mapping, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **Group Mapping** on the ribbon. The **Control Panel** appears.

For specific instruction on setting up group mapping, refer to the DocAve 6 Control Panel Reference Guide.

Permission Mapping

Permission mapping allows you to map permissions in the source to SharePoint permissions in the destination. During the migration, Migrator will replace the source permission with SharePoint permission levels of Default Permission Mapping or your specified permission levels in the destination node.

***Note**: If a user mapping and a permission mapping are used simultaneously, the permission of the destination user is the merged result of the mapped user's permission and the mapped permission.

Managing Permission Mappings

To access Permission Mapping, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **Permission Mapping** on the ribbon. In the **Permission Mapping** interface, all permission mappings that you have created are displayed.

In this interface, you can change the number of permission mappings displayed per page and the order in which they are displayed. To change the number of permission mappings displayed per page, select the desired number from the **Show rows** drop-down list in the lower right-hand corner. To sort the permission mappings, click on a column heading such as **Name** and **Description**.

Perform one of the following actions on a selected permission mapping:

- **Create** – Click **Create** on the ribbon to create a new Permission Mapping. For details on creating a new Permission Mapping, see Configuring and Editing Permission Mappings.
- **View Details** – Click **View Details** on the ribbon and you will see the previously configured settings for this permission mapping. Here you can also click **Edit** on the ribbon to make changes to the permission mapping's settings. You will be brought to the Edit Permission Mapping page where you can change this permission mapping.
- **Edit** – Click **Edit** on the ribbon to change the configuration of this permission mapping. For details on editing permission mapping, see Configuring and Editing Permission Mappings.
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected permission

mappings, or click **Cancel** to return to the Permission Mapping without deleting the selected permission mappings.

Configuring and Editing Permission Mappings

To create a new permission mapping, click **Create** on the ribbon. To edit a previously configured permission mapping, select the permission mapping and then click **Edit** on the ribbon.

In the **Create or Edit Permission Mapping** interface, configure the following settings:

- **Name and Description** – Enter a name for the permission mapping that you are about to create or edit. Then enter an optional **Description**.
- **Permission Mapping** – Set up the mapping of Quickr permissions to SharePoint permissions. Choose a SharePoint permission level from the **SharePoint Permission Level** drop-down list. We do not recommend changing the default permission mapping. If there is no SharePoint permission levels that meets your requirements, you can customize one by selecting **New SharePoint Permission Level** from the drop-down list. For details on creating a new SharePoint permission level, refer to Creating and Editing SharePoint Permission Levels.

SharePoint Permission Levels

You can manage SharePoint Permission Levels by creating a new SharePoint Permission Level, viewing details of a level, editing a level, or deleting a level.

To access Manage SharePoint Permission Level, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **Permission Mapping** on the ribbon. In the **Permission Mapping** interface, click **Manage SharePoint Permission Level** on the ribbon.

The **Manage SharePoint Permission Level** interface displays all permission levels that you have previously created.

In this interface, you can change the number of SharePoint Permission Levels displayed per page and the order in which they are displayed. To change the number of SharePoint Permission Levels displayed per page, select the desired number from the **Show rows** drop-down list in the lower right-hand corner. To sort the SharePoint Permission Levels, click on a column heading such as **Name** and **Description**.

Perform the following actions in the **Manage SharePoint Permission Level** page.

- **Create**– Click **Create** on the ribbon to create a new SharePoint Permission Level, for details on creating a new SharePoint Permission Level, see Creating and Editing SharePoint Permission Levels.
- **View Details** – Click **View Details** on the ribbon and you will see the previously configured settings of a customized permission level or the default setting of a default SharePoint Permission Level.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this SharePoint Permission Level. For details on editing configurations for a SharePoint Permission Level, refer to Creating and Editing SharePoint Permission Levels.

***Note:** Default SharePoint Permission Levels are displayed as default, including Contribute, Design, Edit, Full Control, Read, and View Only. They are not editable.

- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected SharePoint permission levels, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without deleting the selected SharePoint permission levels.

Creating and Editing SharePoint Permission Levels

To create a new SharePoint Permission Level, click **Create** on the ribbon. To modify a customized SharePoint Permission Level, select the SharePoint Permission Level, and then click **Edit** on the ribbon.

In the **Manage SharePoint Permission Level** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this permission level that you are about to create or edit. Then enter an optional **Description** for future references.
2. **Permissions** – Choose which permissions to include in this permission level. You can select specified permissions of List Permissions, Site Permissions, and Personal Permissions by selecting the checkbox before a specified permission. Select the **Select All** checkbox to select or clear all permissions.
3. Click **Save** to save the configuration and return to the **Manage SharePoint Permission Level** interface, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without saving any change.

Configuring Dynamic Rules

Dynamic rule maps the Quickr field names and the corresponding values to SharePoint column names and column values using the DLL files customized in C#.

Managing Dynamic Rules

To access Dynamic Mapping, click **Profile Settings** on the ribbon of **Home** tab. In the **Profile Settings** tab, click **Dynamic Rule** on the ribbon. The **Dynamic Rule** interface appears.

In the **Dynamic Rule** interface, you will see a list of previously configured dynamic rules.

In this interface, you can change the number of dynamic rules displayed per page and the order in which they are displayed. To change the number of dynamic rules displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the dynamic rules, click on a column heading such as **Name**, **Description**, **DLL File Name**, and **Last Modified Time**.

You may perform the following actions to a Dynamic Rule:

- **Create** – Click **Create** on the ribbon to create a dynamic rule. For detailed on creating a new dynamic rule, see Creating and Editing Dynamic Rules.

- **View Details** – Click **View Details** on the ribbon and you will see the previously configured settings for this dynamic rule. Here you can also click **Edit** on the ribbon to make changes to the dynamic rule's settings. You will be brought to the Edit dynamic rule page where you can change this dynamic rule.
- **Edit** – Click **Edit** on the ribbon to change the configuration of this dynamic rule. For details on editing dynamic rule, see Creating and Editing Dynamic Rules.
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected dynamic rule, or click **Cancel** to return to the dynamic rule without deleting the selected dynamic rules.

Creating and Editing Dynamic Rules

To create a new dynamic rule, click **Create** on the ribbon. To edit a previously configured dynamic rule, select the dynamic rule and then click **Edit** on the ribbon.

In the **Create Dynamic Rule** interface or **Edit Dynamic Rule** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for the dynamic rule that you are about to create or edit. Then enter an optional **Description**.
2. **Upload a DLL File** – Browse a dynamic rule of DLL file customized in C# from the local path. A DLL file enables you to configure your own mappings. Click **Browse**, and then navigate to the DLL file you want to use. Select the specified DLL file and then click **Open**.

   ***Note**: AvePoint provides a sample code for the DLL file. Click the **Download the Sample Code** link in the left description to download the sample code.
3. Click **Save** to save the configuration and return to the Dynamic Rule interface. Click **Cancel** to return to the Dynamic Rule interface without saving any configuration or changes.

Setting Up a Quickr Migration Profile

The migration profile allows you to specify and define numerous settings for the migration jobs, including Migration Options, Filter Options, Mapping Options, and Advanced Options.

While it is theoretically possible to run an Online Migration job using the default migration profile without configuring the settings described in the sections below, it is **strongly** recommended that you configure these settings in order to ensure appropriate content management during migration.

Follow the instructions below to create a migration profile.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
3. Enter a profile name in the pop-up window and click **OK**.
4. Select the **Migration Options** from the left-hand pane. Select a Migration Options sub-profile from the drop-down list. For details about this section, refer to Migration Options.
5. Select the **Filter Options** from the left-hand pane and select a filter policy from the drop-down list or click **New Filter Policy** from the drop-down list to create a new filter policy. For details on creating a filter policy, refer to Creating and Editing Filter Policies.
6. Select the **Mapping Options** from the left-hand pane. Select a Mapping Options sub-profile from the drop-down list. For details about this section, refer to Mapping Options.
7. Select the **Advanced Options** from the left hand pane and configure the **Dynamic Rule**, the **Character Length Settings**, and the **Illegal Character Replacement Settings**. For details about this section, refer to Advanced Options.
8. Click **Save** to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace existing main profile** to replace the original profile. Otherwise, it is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current main profile.

Migration Options

Migration options allow you to configure which content settings and security settings can be migrated. Set up a Migration Options Sub-Profile by the following steps.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. Click **Migration Options** on the left-hand pane.
3. In the **Sub-profile** group, click **Edit Sub-profile** to make the **Migration Options** field active.
4. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
5. Enter a sub-profile name in the pop-up window and click **OK**.

6. Click the **Content** tab to configure common settings for this Migration Options. You can configure the following settings:

   - **Managed Path** – When choosing a Web application, site collection, or site as the destination node, a site collection, site, and/or child site will be created automatically during the migration job. You can also specify the managed path, the site template, and the site language for the created site collection/site/child site.
     - **Customize a managed path** – Enter a customized managed path in the textbox. **Sites** is provided as default.
     - **Site template** – Select a site template from the drop-down list. By default, **Team Site** is selected.
     - **Site language** – Select a site language from the drop-down list. **English** is selected by default.

       ***Note**: If the selected site language does not exist in the destination, the site collection or site cannot be created successfully, and the source place and room cannot be migrated to the destination.

   - **Navigation Options** – Choose navigation design options for destination sites that are generated from a Quickr place or room.
     - Display the site on the top link bar of the parent site when creating a site
     - Display the site on the Quick Launch of the parent site when creating a site
     - Inherit top link bar of the parent site when creating a site
   - **Root Page Option** – Specify the name of the library or list that the source root pages are migrated to. Enter your desired library or list name in the textbox. **Root** is provided as the default name.

     ***Note**: The library or list template is determined by what you select in **Default List Template**.

   - **Image Options** – Normally the embedded images in the source Quickr pages are added as attachments of items, which are generated from the pages. To extract the embedded images from the items and collect them in a picture library in SharePoint, select the **Extract embedded images from Quickr into Picture Library** checkbox. **Quickr Picture Library** is provided as the default name of the picture library where you wish the embedded images to be migrated. You can also customize the name by entering a picture library name in the text box.
   - **Attachment Migration Options** – Allows you to collect the attachments that are normally migrated as attachments of the items generated from Quickr pages to a separated document library in SharePoint. Select the **Migrate attachments to separated Document Library** checkbox. **Quickr Attachment Library** is provided as the default name of the document library where you wish the attachments to be migrated. You can also customize the name by entering a document library name in the text box.

- **Folder Structure Management** – Choose whether to collapse the folder structure of the migrated content.
    - **Collapse all the folder structure** – Migrates all of the pages of the nested folders to a same library or list by breaking the source folder structure. Select the **Add a column to keep the source path** checkbox to keep the source path of pages and specify the column name in the textbox. By default, **DocAve Source Path** is provided.

      ***Note:** If you migrate more than 2000 items at one time to a destination, SharePoint performance might be affected.

      ***Note**: If you have configured a list mapping for the source top-level folder, the library or list template is determined by the list mapping. If no list mapping is configured for the source top-level folder, the library or list template is determined by what you selected in **Default List Template**.

- **Index Migration Options** – Choose whether to migrate the source index to a Links list in the destination. Select the **Migrate the source index to a Links list** checkbox and enter a list name in the text box. By default, **Index** is provided.
- **Default List Template** – This is used to specify a default list template which will be used as the template of the lists which are generated from the source top-level folders.

7. Click the **Security** tab to configure **Permission Inheritance**, which allows you to choose whether the site generated from the source place or room will inherit its parent site permission.
8. Click **Save** to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current sub-profile.

Mapping Options

Mapping options allow you to configure list mapping, content type mapping, and security mapping. Set up a Mapping Options Sub-Profile by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** interface appears.
2. Click **Mapping Options** on the left-hand panel, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the **Mapping Options** field active.
3. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a sub-profile name in the pop-up window and click **OK**.
5. Click the **List Mapping** tab and configure the following settings to map the Quickr folder to the specified SharePoint list.

a. Click **Add a List Mapping** and then a mapping entry appears for you to configure relevant rules.

b. Click the text box under the **Quickr Place/Room Name** column and enter the name of the Quickr place or room where the Quickr folder you wish to map resides.

c. Click the textbox under the **Quickr Folder Name** column and enter the name of the Quickr folder that you wish to map in the textbox.

d. Click the text box under the **SharePoint List Name** column and enter the name of the SharePoint list that you wish the Quickr folder to be mapped to in the text box. If the specified list does not exist in the destination, a new list with the specified name will be created automatically during the migration. If you enter an existing list, make sure the list template you select in **step e** is the same as that of the existing one; otherwise, a new list with the selected list template will be created in the destination during the migration and a suffix (_1) is added at the end of the list name.

e. Select or enter a template for your specified SharePoint list from the **SharePoint List Template** drop-down list. Custom List, Document Library, and Wiki Page Library are provided.

f. Repeat the steps above to add more mappings.

g. To delete one or more previously configured list mappings, select them and then click **Delete the Selected List Mapping(s)**. You can also click the delete ( ) button to remove a previously configured list mapping.

***Note**: The source folder **Calendar**, **Tasks**, **Index**, and **Root** are not supported for List Mapping.

6. Configure the Content Type Mapping. You can choose to configure content type and column mapping. Click **Content Type Mapping** on the tab to use the content type mapping that is created by the Migrator Tool or to configure it manually.

   - Choose **Use the content type mapping generated by the Migrator Tool** to automatically apply the content type mapping that you previously created with the Migrator Tool during the migration.

     ***Note**: If you choose this option, make sure that you have generated the content type mapping by Migrator Tool; otherwise, the metadata of the source pages will not be migrated to the destination.

   - To configure the content type mapping in this page, select the **Manually configure the content type mapping** option and the **Rule** appears. Configure the following settings to set up a rule:

     - **Content Type Mapping** – This is used to map the Quickr form to the specified SharePoint content type. Enter the name of a Quickr form in the column of **Quickr Form** and the name of a specified SharePoint content type on the column of **SharePoint Content Type**. If the SharePoint content type does not

exist in the destination, a new content type with the specified name will be created automatically during the migration. If you enter an existing content type in SharePoint, by default, the content type will be updated. If you do not wish to update this content type, you need to disable Update Content Type in configuration file. On the destination DocAve Agent server, navigate to *…\AvePoint\DocAve6\Agent\data\Migrator\QuickrSettings\ConfigurationFile* to open **QuickrMigrationWorker.xml** with Notepad and change the value of <ContentTypeConfig UpdateContentType="True"> to **False**.

- **Column Mapping** – Allows you to specify the SharePoint column name and SharePoint column type for the mapped Quickr field. Click **Add a Column Mapping** to create a column mapping. Enter the name of a Quickr field in the column of **Quickr Field Name** and the name of a specified SharePoint column name in the column of **SharePoint Column Name**. Then select a SharePoint column type for this column from the **SharePoint Column Type** drop-down list.

  Repeat the steps by clicking **Add a Column Mapping** to add more column mappings. To delete one or more previously configured column mappings, select the mapping(s) and then click **Delete the Selected Column Mapping(s)**. You can also click the delete ( ) button to remove a previously configured column mapping.

  ***Note:** If you select **Managed Metadata**, it requires you to specify the term set path, and choose whether to allow multiple values in this column. For example, in the **Term Set Path** text box, System is the group name; ";" is the separator; Keywords stands for the term set. Select the **Allow multiple values** checkbox to define multiple values for the column. You can customize which separator will be used to separate multiple values in the text box. "**;**" is provided as default.

  Click the plus ( ) button beside the **Rule 1** tab to add more rules.

7. Configure the Security Mapping. Click **Security Mapping** on the tab to choose user mapping, group mapping, permission mapping, and configure AD group mapping.

   - **User Mapping** – Select a previously configured user mapping from the drop-down list or click **New User Mapping** in the drop-down list to create a new one. For details on creating a user mapping, refer to the DocAve 6 Control Panel Reference Guide.
   - **Group Mapping** – Select a previously configured group mapping from the drop-down list or click **New Group Mappin**g in the drop-down list to map a source group to a SharePoint group. For details on creating a group mapping, refer to the DocAve 6 Control Panel Reference Guide.
   - **AD Group Mapping** – Allows you to map the Quickr group to a specified AD group which exists in the domain of the SharePoint environment. Click **Add an AD Group Mapping**, then enter the name of the Quickr group in the column of **Quickr Group Name** and the name of the AD group in the column of **AD Group Name**. Repeat the steps by clicking **AD Group Mapping** to add more AD Group Mappings. To delete a one or more previously configured AD group mappings, select the mappings and then click **Delete**

the Selected AD Group Mapping. You can also click the delete ( ) button to remove a previously configured AD group mapping.

- **Permission Mapping** – Select a previously configured permission mapping from the drop-down list or click **New Permission Mapping** to create a new one. For details on creating a permission mapping, refer to Configuring and Editing Permission Mappings.

  ***Note:** If you do not configure or select any permission mapping, the default permission mapping will be applied during the migration.

8. Click **Save** to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace existing sub-profile** to replace the original profile. Otherwise, the new profile is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current sub-profile.

Advanced Options

Advanced options allow you to configure Dynamic Rule, Character Length Settings and Illegal Character Replacement Settings. To set up Advanced Options, complete the following steps:

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** interface appears.
2. Click **Advanced Options** on the left-hand pane, and then the **Advanced Options** page appears. You can configure the following settings:

   - **Dynamic Rule** – Maps the source Quickr field names and the corresponding values to SharePoint column names and column values. Select a dynamic rule from the drop-down list or click **New Dynamic Rule** to create a new one. For details on creating a dynamic rule, refer to Creating and Editing Dynamic Rules.
   - **Character Length Settings** – This is used to set character length limitations for folder name, file name, and SharePoint URL.
     - **Maximum Length of the folder name** – The default value is 60 and you can define the value between 1 and 128. If the folder name exceeds the limitation, the extra characters will be pruned from the end. For example, a folder migrated from a database is named **abcdef** in the source and the value that you set here is 5. The folder will be named **abcde** after the migration.
     - **Maximum Length of the file name** – The default value is 80 and you can define the value between 1 and 128. If the file name, including the file extension, exceeds the limitation, the extra characters will be pruned from the end. For example, a file is named **abcdef.txt** in the source and the value that you set here is 5. The file will be named **a.txt** after the migration.
     - **Maximum Length of the SharePoint URL** – The default value is 255 and you can define the value between 1 and 260. The length of the SharePoint URL is calculated from the first character of the managed path after **/**. When the folder or file's URL exceeds the limitation, the migration results are as follows:

        - If the folder URL exceeds the limitation, the folder and its content will be migrated to its previous level folder until the folder URL does not exceed the limitation. If there is a file whose URL exceeds the limitation within a folder, it will be migrated to its previous level folder until the file URL does not exceed the limitation.
        - If the file URL exceeds the limitation, the file will be migrated to its previous level folder until the file URL do not exceeds the limitation.
    - **Illegal Character Replacement Settings** – This is used to replace illegal SharePoint characters with valid characters. You can modify and add the illegal character mappings for group level, folder level, and file level to the specified characters in SharePoint. By default, all illegal characters are replaced with an underscore (_).Click **Group Level**, **Folder Level**, or **File Level** on the tab to enter into each page.
        - To modify an illegal character mapping, double-click an underscore in the column of **Replace with** behind an illegal character and change it to a new character.
        - To add an illegal character mapping, click **Add an Illegal Character** and then enter your specified illegal character in the column of **Illegal character in SharePoin**t and the corresponding valid character in the column of **Replace with**. Click **Add an Illegal Character** again and another illegal character mapping can be created.
        - To delete one or more previously configured illegal character mappings, select the mappings and click **Delete the Selected Illegal Character(s)**. You can also remove a previously configured illegal character mapping by clicking the delete ( ) button.

Managing Sub-profiles

Refer the information below to manage an existing sub-profile.

Editing an Existing Sub-profile

To edit an existing sub-profile, complete the following steps:

1. Select an existing sub-profile from the **Sub-Profile** drop-down list.
2. Click **Edit Sub-profile** in the **Sub-profile** group to edit the sub-profile settings.
3. Click **Save** in the **Sub-profile** group to save the sub-profile settings. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile.

Deleting an Existing Sub-profile

To delete an existing sub-profile, complete the following steps:

1. Select an existing sub-profile from the **Sub-Profile** drop-down list.
2. Click **Delete** in the **Profile/Sub-profile** group to delete the sub-profile, or click **Delete** next to the sub-profile name in the drop-down list.

   ***Note:** The default sub-profile and the sub-profile used in the main profile cannot be deleted.

Uploading a Previously Configured Sub-profile

To upload a previously configured sub-profile, complete the following steps:

1. In the **Profile Settings** interface, click **Migration Options** or **Mapping Options** on the left panel.
2. Click **Edit Sub-profile** to make the **Migration Options** field active.
3. Click **Upload** in the **Sub-profile** group.
4. Select a previously created sub-profile and click **Open** to upload it. If a sub-profile having the same name exists in DocAve, you have two options:
   - **Upload as a new profile** – Upload the sub-profile and add a suffix in the sub-profile name, for example, *subprofile_1*.
   - **Overwrite current profile** – Replace the existing sub-profile. The Default Mappings and Default Migration Options sub-profiles cannot be overwritten.

Downloading an Existing Sub-profile

To download an existing sub-profile, complete the following steps:

1. In the **Profile Settings** interface, click **Migration Options** or **Mapping Options** on the left-hand panel.
2. Select an existing sub-profile and click **Edit Sub-profile** in the **Sub-profile** group.
3. Click **Download** in the **Sub-profile** group to save the sub-profile to the local disk.

Performing a Quickr Migration

A Quickr Migration migrates contents, securities, and configurations from Quickr to the SharePoint environment.

To start a Quickr migration job, click **Online Migration** on the ribbon.

To perform a Quickr migration job, follow the instructions below.

Select the Source and Destination Nodes

1. Click **Select Source** in the **Source** pane or in the **Actions** group on the ribbon to select the source. The **Select Source** interface appears. Configure the following settings.
    a. **Agent** – Select the DocAve Agent installed in Quickr environment from the drop-down list.
    b. **Connection** – Select the Quickr connection.
    c. **Quickr Server** – Select the source Quickr server from the drop-down list.
    d. Click **OK** to complete configuration of selecting source. To change the source, click **Change Source** in the source pane or in the **Actions** group on the ribbon. Then repeat the steps described above.
    e. Select the node that stores data you wish to migrate. If working in a large environment, enter the name of the node (for example, place and room) into the **Input Keyword** text box to search for the desired node. You can only search for the nodes that have names displayed in the currently expanded tree. The nodes that are not displayed in the expanded tree cannot be searched.
    f. Select the source node by selecting the corresponding checkbox.
2. In the **Destination** pane, click the farm name or **My Registered Sites** to expand the data tree.

    ***Note**: Make sure that you have configured the migration database; otherwise, the destination farm will be unavailable. For details on configuring a migration database, refer to Configuring Migration Databases.

    To select the destination node:

    a. Find the destination node that you wish to migrate the source data to.
    b. To narrow down the search criteria and display fewer nodes on the tree, right-click the specified node and select **Advanced Search**. In the **Advanced Search** interface, click **Add a Criterion** and configure the following settings:
        i. **Rule** – Select the rule for this search. The table below lists the supported rules for each node that is supported for Advanced Search.

Environment	Node	Rule
SharePoint On-Premises	Farm Level	Web Application: URL
	Web Application Level	Site Collection: Name
		Site Collection: URL
	Sites	Site: Name
		Site: URL
	Lists	List/Library: Name
		List/Library: URL
SharePoint Online (My Registered Sites)	**Sites**	Site: Name
		Site: URL
	Lists	List/Library: Name
		List/Library: URL

ii. **Condition** – Select the condition for the rule from the drop-down list.

iii. **Value** – Enter the value for the rule in the text box.

To add more criteria, click **Add a Criterion**, and repeat steps above. You can change the logical relationships between the criteria by clicking the **And** or **Or**. By default, the logical relationship is set to **And**. **And** means that the child nodes that meet all of the criteria will be included in the result. **Or** means that the child nodes that meet any criterion will be included in the result. The **Basic Filter Condition** area displays the logic relationships of filter criteria.

Click **Search** to start searching the child nodes.

c. Select the destination node by clicking corresponding radio button. You can also create a new site collection or site by entering the specified name and click **Create Container**. For details on creating containers, refer to Creating Containers.

3. There are two methods to saving and/or running this job:

- Click **Run Now** to perform a migration job immediately, and then the **Run Now** interface appears. For more information on how to configure the **Run Now** interface, refer to Configuring the Run Now Interface.
- Click **Save As New Plan**, and then you are brought to the **Save As New Plan** interface. For more information on how to configure the **Save As New Plan** interface, refer to Configuring the Save As New Plan Interface.

Creating Containers

Containers are created in the destination prior to a migration in order to store the migrated content. The destination container in Quickr Migration can be a Web application, site collection, or site.

DocAve allows you to create containers in SharePoint without leaving the DocAve interface, allowing you to perform migration tasks without having to use SharePoint to create all of the necessary containers in the destination.

To create a container, in the Destination pane, enter the name of a new container in the available field, and then click **Create Container**. The **Create Container** interface will pop up. Depending on the container type you are creating, configure the settings for each type of container as such:

Creating a Site Collection

Configure these settings in the Create Site Collection page:

- **Title and Description** – Enter the **Title** of the new site collection and a **Description** for future references.
- **Template Selection** – Select the desired language from the **Select a language** drop-down list. Then select a site template for this new site collection. Click on a tab to access the templates listed in that category, or click on the **Custom** tab and select **Select Template Later…** to not choose a template upon creation.
- **Primary Site Collection Administrator** – Enter the **Username** of the primary administrator for this site collection. Then click the check ( ) button to check whether the user is valid, or click the browse ( ) button to select people and groups in a new page.
- **Secondary Site Collection Administrator** – Enter the **Username** of the secondary administrator for this site collection.
- **Quota Template** – Select the storage quota template to apply to this site collection.
- **Content Database** – Select the Content Database for this site collection

Click **OK** to create the new site collection, or click **Cancel** to close the Create Container interface.

Creating a Site

Configure these settings in the Create Site page:

- **Title and Description** –Enter the **Title** of the new site and a **Description** for future references.
- **Template Selection** – Select the desired language from the **Select a language** drop-down list. Then select a site template for this new site. Click on a tab to access the templates listed in that category.
- **Permissions** – Select **Use unique permissions** to allow a unique set of users access to this new site. Select **Use same permissions as parent site** to allow the same users who can access the parent site access to this new site.
- **Navigation** – Select the **Yes** radio button if you want a link to this site to appear in the Quick Launch and top link bar of the parent site.
- **Navigation Inheritance** – Select **Yes** to use the top link bar from the parent site.

Click **OK** to create the new site, or click **Cancel** to close the **Create Container** interface.

Configuring the Run Now Interface

In the **Run Now** interface, configure the following settings to perform a migration immediately:

1. **Conflict Resolution** – Specify the conflict resolution when the item name in the Quickr conflicts with an existing item in the SharePoint. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check the lower objects, and configure the **Content Level** conflict resolution. Skip provides the configuration of the content level conflict resolution optional. For details about conflict resolution, refer to Appendix D: Conflict Resolution.
2. **Profile Selection** – Configure the related migration options, filter options, mapping options and advanced options for the migration job. Select a previously configured profile from the drop-down list. Quickr Migration provides you a default main profile named **Default Profile**.
3. **Destination Agent Group** – Select a destination agent group to execute the migration job. An agent group can contain multiple agents for load balancing and better performance.

   ***Note:** This section only appears when the destination node is in SharePoint on-premises.

4. **Migration Database** – Check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, click **Details**, Agent Name and Status are displayed.
5. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.
6. **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Quickr migration job status. If the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
7. Click **OK** to run the job immediately or click **Cancel** to return to the **Home** page of Online Migration.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to build up a migration plan:

1. **Plan Name** – Enter a name for the plan that you are about to create. Then enter an optional **Description**.
2. **Profile Selection** – Configure the related migration options, mapping options and advanced options for the migration job. Select a previously configured profile from the drop-down list to apply the migration settings to the migration job. Quickr Migration provides you a default main profile named **Default Profile**.

3. **Destination Agent Group** – Select a destination agent group to execute the migration job. An agent group can contain multiple agents for load balancing and better performance.

   ***Note:** This section only appears when the destination node is in SharePoint on-premises.

4. **Schedule Selection** – Select one type of schedule to run the plan.

   - **No schedule** – Select this option to run the plan manually.
   - **Configure the schedule myself** – Select this option and the **Schedule Settings** section appears under **Schedule Selection**.

     ***Note**: If any of the Domino Admin, Lotus Notes, Domino Designer, and Migrator Tool is being used while the job is running, the job may fail. Make sure none of them is being used while the job is running.

5. **Schedule Settings** (This section only appears when you choose **Configure the schedule myself**) – Click **Add Schedule** to create a new schedule. For details about configuring a schedule, refer to Configuring the Add Schedule Interface. To preview a configured schedule, select the schedule and click **Calendar View** to view it in a calendar. You can delete a previously configured schedule by clicking the delete (✕) button behind a corresponding schedule.
6. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide when a certain triggering event occurs.
7. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.
8. **Migration Database** – Check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, click **Details**, Agent Name and Status are displayed.
9. When finished configuring the plan, select one of the following options:

   - Click **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to Managing Plans.
   - Click the triangle next to **Save**, then select **Save and Run Now** to save the plan and execute it right away. Then the **Run Now** interface appears. Configure the following settings:
     - **Options** – Select a type of migration for this migration job.
       - **Full migration** – Choose this option to migrate all contents from the source node to the destination node according to the profile.
       - **Incremental migration** – Choose this option to only migrate the source node content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to be migrated in the last migration job.

- **Conflict Resolution** – Specify the conflict resolution when the item name in Quickr conflicts with an existing item in SharePoint. For **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects, and configure the **Content Level** conflict resolution. Skip provides the configuration of **Content Level** conflict resolution optional. If you select **Incremental migration** in **Options** and do not select **Skip** as **Content level** conflict resolution, you can also choose whether to **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job**. For details about conflict resolution, refer to Appendix D: Conflict Resolution.
- **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Quickr migration job status. If the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

10. Click **OK** to run the online migration job.

Configuring the Add Schedule Interface

In the **Add Schedule** interface, configure the following settings to add a schedule:

1. **Options** – Select a type of migration for the customized schedule. Choose **Full migration** to migrate all contents from the source node to the destination node according to the profile. Choose **Incremental migration** to only migrate the modified content (**Add** and **Modify**) and the failed content of the source node since the last migration job.
2. **Conflict Resolution** – Allows you to specify the conflict resolution for handling when the item name in Quickr conflicts with an existing item in SharePoint. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects for conflicts, and configure content level conflict resolution. Skip provides the configuration of the **Content Level** resolution optional. If you select **Incremental migration** in **Options** and do not select **Skip** as **Content level** conflict resolution, you can also choose whether to **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job**. For details about conflict resolution, refer to Appendix D: Conflict Resolution.
3. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.
4. **Range of Recurrence** – Specify when to start and end the running recurring schedule.
    - **Start time** – Set up the time to start the plan and Time Zone can be changed under the Start time.

      ***Note:** The start time cannot be earlier than the current time.

    - **No end date** – Select this option to repeat running the plan until being stopped manually.
    - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrence(s) that you configure in the text box.

- **End by** – Set up the time to end the recurrence of plans.

5. **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to be migrated and you have selected the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
6. Click **Save** to save the configuration of schedule, or click **Cancel** to return to the **Save As New Plan** interface without saving any changes.

Quickr Migration for SharePoint Online

You can use Quickr Migration to migrate Quickr objects to SharePoint Online. To perform this function properly, you must configure your SharePoint sites in Control Panel. For more detailed information on configuring SharePoint sites, refer to the **Registered SharePoint Sites** section in the DocAve 6 Control Panel Reference Guide.

Before using Quickr Migration for SharePoint Online, make sure you have purchased the corresponding Quickr to SharePoint Online Migration licenses. You can navigate to **DocAve 6 Manager** > **Control Panel** > **License Manager**, then click **Migration** tab to view whether or not the corresponding **Quickr Migration for SharePoint Online** licenses are available.

For details on how to manage migration profiles or perform a Quickr Online Migration job, refer to About Online Migrations.

***Note:** Quickr Migration to SharePoint Online does not support the Create Container function at the site collection level in a SharePoint Online destination node.

***Note:** In **User Mapping**, the **Add a placeholder account to keep metadata even if the user no longer exists** option is not supported for use with Quickr Migration to SharePoint Online. This option replaces non-existent destination users with a placeholder account in the destination Active Directory.

***Note:** You can use a DocAve Agent that cannot connect to the internet to run a Quickr Migration job using SharePoint Online nodes. To do so, you must configure the **Agent Proxy Settings** in **Control Panel**. For more information, refer to the DocAve 6 Control Panel Reference Guide.

Supported and Unsupported Elements in Quickr Migrator

The following table lists the current supported and unsupported elements for Quickr Migrator.

DocAve Quickr Migrator does not support the elements that are not listed in the table below.

Source Element	Destination Object	Support Status	Note
Place	Site Collection	Supported	
	Site		
Room	Site	Supported	
Folder	Custom List	Supported	
	Document Library		
	Wiki Page Library		
	Folder		
Blog Place	Site Collection	Supported	
	Site		
Blog Entry	Item	Supported	
Wiki Place	Site Collection	Supported	
	Site		
Wiki Page	Item	Supported	
Page	Item	Supported	
Draft Page	Item	Supported	
Workflow	N/A	Unsupported	
Page Revision	Item	Supported	
Calendar	Item in Calendar	Supported	
Task	Item in Task	Supported	
Bullet\Numbered List	N/A	Supported	
Table	N/A	Supported	
Image	N/A	Partially Supported	For the image that is uploaded through the External Image method, the content of the image are not displayed in the destination.
Emoticon	N/A	Partially Supported	The icons of the emoticons in Blog Entry/Wiki Page are not properly displayed in the destination.
Attachment	N/A	Supported	
Hyperlink	N/A	Supported	
Customize Forms	Content Type	Supported	
Field-Plain Text/Rich Text/Legacy Rich Text	Column	Supported	
Field-Text Area	Column	Supported	

Source Element	Destination Object	Support Status	Note
Field-Pop-up List	Column	Partially Supported	Only the option selected in the source is supported. The deselected options are unsupported for migration.
Field-Date/Time/Name Pop-up	Column	Supported	
Field-Calendar Date-Time	Column	Supported	
Field-Task	Column	Supported	
Field-Notification Indicator	N/A	Unsupported	
Field-Non-Editable Rich Text	N/A	Unsupported	
Field-Content Author	N/A	Unsupported	
Field-Creation Date	N/A	Unsupported	
Field-Last Content Editor	N/A	Unsupported	
Field-Last Modified Date	N/A	Unsupported	
Field-Content Size	N/A	Unsupported	
Field-Serial Number	N/A	Unsupported	

Managing Plans

The Plan Manager allows users to view, edit, delete, test run, and run plans. After launching the migration module, click **Plan Manager** next to the **Home** tab. In the **Plan Manager** interface, all plans that you have created are displayed in the main display pane.

In this interface, you can change the number of plans displayed per page. To change the number of plans displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the plans, click the column heading such as **Plan Name**, and **Plan ID**.

Perform the following actions in the **Plan Manager** interface:

- Select a plan and click **View Details**. The source node and the destination node are displayed on the data tree. You can also click **Settings** on the ribbon to view the migration settings of this plan. When you want to change the nodes you selected or want to modify the migration settings, click **Edit** on the ribbon.
- Select a plan and click **Edit** on the ribbon to change the configurations for the selected plan. You can change the nodes you selected and modify the migration settings. Besides, you can click **Profile Settings** or **Create Container** to performing the corresponding actions.
- Select the plans that you want to delete and click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected plans, or click **Cancel** to return to the **Plan Manager** interface without deleting the selected plans.
- Click **Test Run** to perform a test run job that simulates the real migration job. By viewing the job report of the test run, you can find whether the source contents can be migrated to the destination successfully, and then adjust the plans or optimize the settings.

  ***Note**: Test Run results may differ from the results of an actual migration. Investigate Test Runs that display **Finished with Exceptions** results by reviewing the log file. If no obvious content, metadata, or permission errors are found, it is likely that the actual migration will complete successfully.
- Click **Run Now** to perform the migration job.

Quickr Migrator Tool

Quickr Migrator Tool resides in …*AvePoint**DocAve6**Agent**bin**MigratorTool.exe*. This tool is used to scan the source objects and generate the Scan Analysis Report to help determine whether there will be any potential risks in the migration job. You can also use this tool to generate the content type and user mappings for the selected places, which will be used to migrate the source content and security. Refer to the DocAve 6 Supplementary Tools User Guide for instructions on using this tool.

Accessing Quickr Migration Hot Key Mode

In order to work faster and improve your productivity, DocAve supports Hot Key mode for you to perform corresponding actions quickly by using only the keyboard.

To access Hot Key mode, in DocAve interface, use the key combinations of **Ctrl** +**Alt** + **Z** on the keyboard, and then press **1** to direct to the products pane. To access the Migration products, press **M**, then, press **Q** to enter the Quickr Migration interface.

To access Hot Key mode, in **Quickr Migration** interface, use the key combinations of **Ctrl + Alt + Z** on the keyboard.

The following is a list of hot keys for the top level, each time you want to go back to the top level after accessing the interface of lower level, press **Ctrl + Alt +Z** on the keyboard.

For example, continue pressing **H**, you are brought to Quickr Migration Home Page.

Operation Interface	Hot Key
Quickr Migration Home Page	H
Quickr Migration Plan Manager	P
DocAve Home Page	1
DocAve Online Community	2
Control Panel	3
Job Monitor	4
Plan Group	5
Health Analyzer	6
Account Information	9
Help and About	0

Home Page

To access the Home page by using hot keys, in the **Quickr Migration** interface, use key combination of **Ctrl + Alt + Z** to access the Hot Key mode, and then press **H** on the keyboard to enter the Home page.

The following is a list of hot keys for functionalities on the ribbon of the Home page.

For example, continue pressing **O**, you are brought you the Online Migration.

Functionality Name and Hot Key	
Online Migration	O
Profile Settings	PS
Configure Connection	CF
Migration Database	MD
Job Monitor	J

Migration Database

Functionality Name and Hot Key					
Configure	C	Save	O		
		Cancel	C		
View Details	V	Configure	C	Save	O
				Cancel	C
		Close	X		
Close	X				

Configure Connection

Functionality Name and Hot Key			
Create	N	Save	S
		Cancel	C
View Details	V	Edit	E
		Close	X
Edit	E	Save	S
		Cancel	C
Delete	D		
Close	X		

Profile Settings

Functionality Name and Hot Key					
Filter Policy	F	Create	N	Save	S
				Cancel	C
		View	V	Edit	E
				Cancel	C
		Edit	E	Save	S
				Cancel	C
		Delete	D		
		Close	X		
Mappings	M	User Mapping	U		
		Group Mapping	G		
		Permission Mapping	P	Create	N
				View Details	V
				Edit	E
				Delete	D
				Manage SharePoint	M

Functionality Name and Hot Key					
				Permission Level	
				Close	X
Dynamic Rule	DY	Create	N		
		View Details	V		
		Edit	E		
		Delete	D		
		Close	X		
Set as Default	DF				
Edit Sub-profile	ES				
Upload	U				
Download	DL				
New	N				
Delete	DE				
Save	S	Save	S		
		Save As	A		
Discard Changes	DC				
Close	X				

Online Migration

Functionality Name and Hot Key					
New Plan	N				
Select Source	SS	OK	O		
		Cancel	C		
Create Container	CC	OK	O		
		Cancel	C		
Save As New Plan	A	Save	S	Save	SA
				Save and Run Now	SR
		Cancel	C		
Run Now	R	OK	O		
		Cancel	C		
Change Source	SS	OK	O		
		Cancel	C		

Plan Manager Page

To access the Plan Manager page by using hot keys, in the **Quickr Migration** interface, use key combinations of **Ctrl + Alt + Z** to access the Hot Key mode, and then press **P** on the keyboard to enter the Plan Manager page.

For example, continue pressing **V**, you are brought to the **View Details** interface.

Functionality Name and Hot Key							
View Details	V	Source & Destination	SD				
		Settings	SE	Edit	E		
				Close	X		
		Edit	E	Source & Destination	SD		
				Settings	SE		
				Save	SA	Save	SA
						Save As	A
						Save and Run Now	SR
				Cancel	X		
Edit	E	Source & Destination	SD	Create Container	CC	OK	O
						Cancel	C
				Save	SA	Save	SA
						Save As	A
						Save and Run Now	SR
				Cancel	X		
		Settings	SE	Save	SA	Save	SA
						Save As	A
						Save and Run Now	SR
				Cancel	X		
Delete	D						
Test Run	TR	OK	O				
		Cancel	C				
Run Now	R	OK	O				
		Cancel	C				

Appendix A: Quickr Migration Database Information

Refer to the following tables for the detailed job information stored in the migration database. In Job Detail, you can view the details of each migrated source object, the source/destination object ID, the URL of the source/destination object, the size of the source object, the owner of the source/destination object, the migration start time, the end time, and so on. In Job Notification, you can view the status of the migration job and view the comment related to the migration job. In Job Statistic, you can view the statistical information of the migration job, such as, the job ID, the plan ID, the source/destination start time, the source/destination end time, the source/destination Agent name, the number of migrated/failed/skipped items/folders/lists, and so on.

Job Detail

View the information of the job details in the table below.

Column Name	Description	Value
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations. The job ID prefix for Quickr migration is QM. For example, QM20120702184324729287, it indicates a Quickr migration job ID.
SequenceId	It is the sequence ID of each migrated source object.	The value represents the sequence of each migrated source object. For example, 1, it indicates that this source object is the first migrated object.
SourceObjectId	It is the ID of the source object.	The value is the ID of the source object.
SourceObjectParentID		The value is the ID of the parent of the source object.
TargetObjectId	It is the ID of the target object.	The value is the GUID of each target object level from site collection level to item level. For example, 08e90aee-c8d8-474b-8979-c1250a32b94d is the GUID of the target list. For Web application level, the value displayed is 00000000-0000-0000-0000-000000000000.
TargetObjectParentID		The value is blank.
SourceFullUrl	It is the full URL of the source object.	The value is the full URL of the source object. Use the value to find the source object.

Column Name	Description	Value
TargetFullURL	It is the full URL of the target object.	The value is the full URL of the target object. Use the full URL to find the target object. If the source object is not migrated to the target, the column value is blank.
SourceObjectTitle	It is the title of the source object.	The value is the title of the source object.
TargetObjectTitle	It is the title of the target object.	The value is the title of the target object.
SourceObjectType	It is the type of the source object.	The value represents the type of the source object, which is different according to the source you selected. • 999 – Quickr Place • 998 – Quickr Room • 997 – Quickr Page • 996 – Quickr Attachment • 995 – Quickr Folder • 1001 – Quickr Group • 1002 – Quickr User
TargetObjectType	It is the type of the target object.	The value represents the type of the target object. • 10001 – Web Application • 10002 – Site Collection • 10003 – Site • 10004 – Library • 10005 – List • 10006 – Folder • 10007 – Document • 10008 – Item • 10009 – Attachment
SourceObjectSizeBytes	It is the size of the source object. The unit is byte.	The value is the real size of the source object.
TargetObjectSizeBytes	It is the size of the target object. The unit is byte.	The value is the size of the target object.
SourceObjectOwner	It is the owner of the source object.	The value represents the user who creates the source object.

Column Name	Description	Value
TargetObjectOwner	It is the owner of the target object.	The value represents the user who creates the source object.
SourceObjectVersion	It is the version of the source object.	The value represents the version information of the source object.
TargetObjectVersion	It is the version of the target object.	The value represents the version information of the target object.
Operation	It is the operation performed for each source object during migration.	The value represents the operation performed when migrating the source object to the target. • 0 – None • 1 – Skipped • 2 – New Created • 3 – Overwritten • 4 – Appended • 5 – Filtered • 7 – Merge
Status	It is the migration status of the source object.	The value represents the status of the job. • 0 – Starting • 1 – Successful • 2 – Backup Failed • 3 – Restore Failed • 4 – Filtered Out • 5 – Skipped • 6 – Exceptional
StartTime	It is the time when the backup starts.	The value represents the time when the backup starts.
EndTime	It is the time when the restore completes.	The value represents the time when the restore completes.
FilteredOutPolicy	It is the status of using filter policy.	The value represents the status of using filter policy. • 0 – Not Used • 1 – Used
TruncatedPolicy	It is the truncated policy that is applied to the source object.	The value represents the truncated policy that is applied to the source object. • None – No truncated policy.

Column Name	Description	Value
		• Truncated – The object name is truncated. • Renamed – The object name is renamed. • MoveUp – The object is moved up to the higher level.
TruncatedOrRenamedAs	It is the new name of the object in the target.	The value is the new name of the object in the target after truncating or renaming.
CustomMetadata	It is the status of using custom metadata.	The value represents the status of using custom metadata. • 0 – Not Used • 1 – Used The default value is false.
MetadataMapping	It is the statues of using C-Based Object Oriented Language (C# Language) Mapping.	The value represents the status of using C-Based Object Oriented Language (C# Language) Mapping. • 0 – Not Used • 1 – Used
Message	It displays the migration message of the source object.	The value is the migration message of the source object.

Job Notification

View the information of the job notifications in the table below.

Column Name	Description	Value
SequenceId	It is the ID of the sequence for each job.	The value represents the sequence of each job. For example, 1, it indicates that this job is the first migration job.
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations. The job ID prefix for Quickr migration is QM. For example, QM20120702184324729287, it indicates a Quickr migration job ID.
Status	It is the status of the job.	The value represents the status of the job.

Column Name	Description	Value
		• 0 – In Progress • 2 – Finished • 3 – Failed • 4 – Stopped • 7 – Finished With Exception • 8 – Paused
Message	It displays the job comment.	The value displayed is the same as the comment in Statistics of Job Details.

Job Statistic

View the information of the job statistics in the table below.

Column Name	Description	Value
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations. The job ID prefix for Quickr Migration is QM. For example, QM20120702184324729287, it indicates a Quickr migration job ID.
PlanId	It is the ID of the plan.	The value is the plan ID, for example, PLAN20120702184321934938.
PlanName	It is the name of the plan.	The value is the plan name. If you run a job without saving it as a plan, the value is Instance Plan.
PlanGroupId	It is the ID of the plan group.	The value is the ID of the plan group that you set for the plan.
PlanGroupName	It is the name of the plan group.	The value is the name of the plan group that you set for the plan.
SourceAgentType	It is the source Agent type.	The value represents the source Agent type. The value for Quickr is 10.

Column Name	Description	Value
TargetAgentType	It is the target Agent type.	The value represents the target Agent type. • 5 – SharePoint 2010 • 6 – SharePoint 2013 • 11 – SharePoint Online
SourceAgentName	It is the source Agent name.	The value is the source Agent name.
TargetAgentName	It is the target Agent name.	The value is the target Agent name.
Status	It is the status of the job.	The value represents the status of the job. • 0 – In Progress • 2 – Finished • 3 – Failed • 4 – Stopped • 7 – Finished With Exception • 8 – Paused
Run Type	It is the type of the job.	The value represents the type of the job. • 0 – Run/Rerun • 1 – Test Run
SourceStartTime	It is the time when the backup starts.	The value represents the time when the backup starts.
SourceFinishTime	It is the time when the backup completes.	The value represents the time when the backup completes.
TargetStartTime	It is the time when the restore starts.	The value represents the time when the restore starts.
TargetFinishTime	It is the time when the restore completes.	The value represents the time when the restore completes.
Description	It is the description of the job.	The value is the description of the job.
UserName	It is the DocAve user who runs the job.	The value is the username who runs the job.
JobOption	It is the option of the job.	The value is 0.

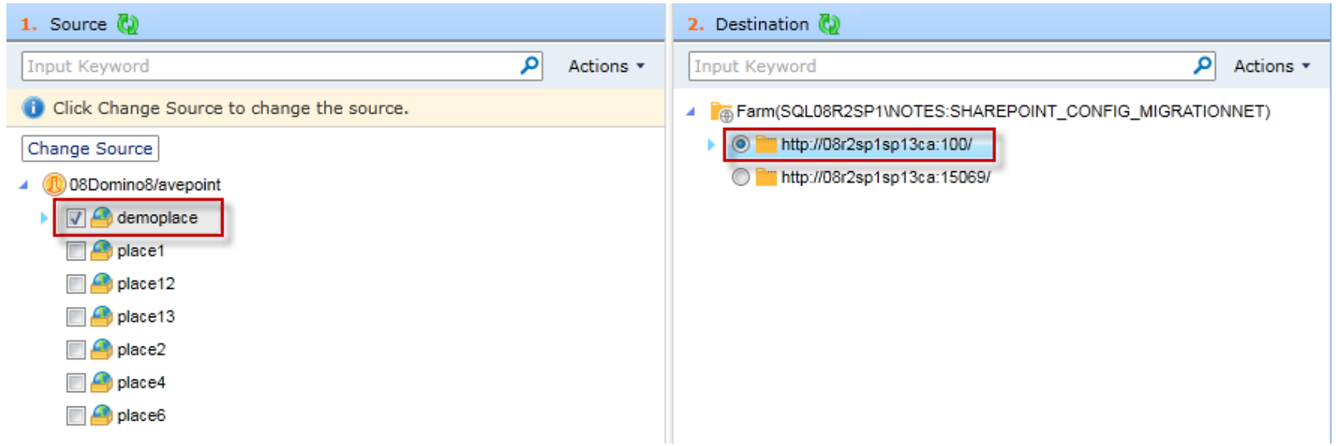
Column Name	Description	Value
JobType	It is the type of the job.	The value represents the type of the job. • 0 – Full Migration • 1 – Incremental Migration
ContainerConflictResolution	It is the container conflict resolution.	The value represents the resolution of container conflict. • 0 – Skip • 5 – Merge
ContentConflictResoltuion	It is the content conflict resolution.	The value represents the resolution of content conflict. • 0 – Skip • 2 – Append • 3 – Overwrite
MigratedBytes	It is the size of the migrated data. The unit is byte.	
FailedBytes	It is the size of the data that are failed to be migrated. The unit is byte.	
SkipedBytes	It is the size of the skipped data. The unit is byte.	
FilteredBytes	It is the size of the data that is filtered out. The unit is byte.	
MigratedSiteCollectionCount	It is the number of migrated site collections.	
MigratedSiteCount	It is the number of the migrated sites.	
MigratedListCount	It is the number of the migrated lists.	
MigratedFolderCount	It is the number of migrated folders.	
MigratedItemCount	It is the number of migrated items.	
FailedSiteCollectionCount	It is the number of site collections that are failed to be migrated.	
FailedSiteCount	It is the number of the sites that are failed to be migrated.	
FailedListCount	It is the number of the lists that are failed to be migrated.	
FailedFolderCount	It is the number of the folders that are failed to be migrated.	

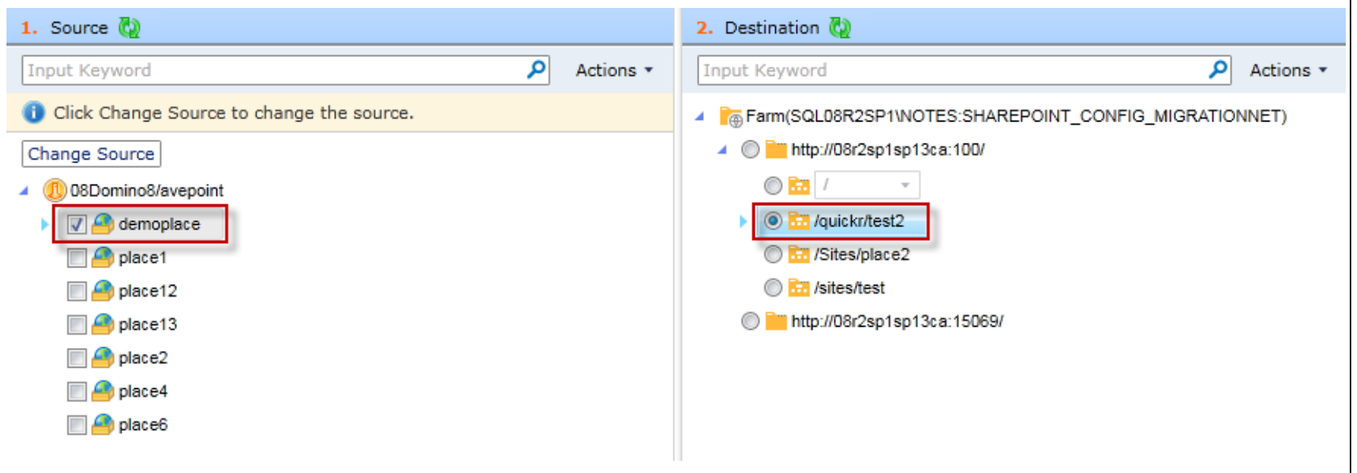
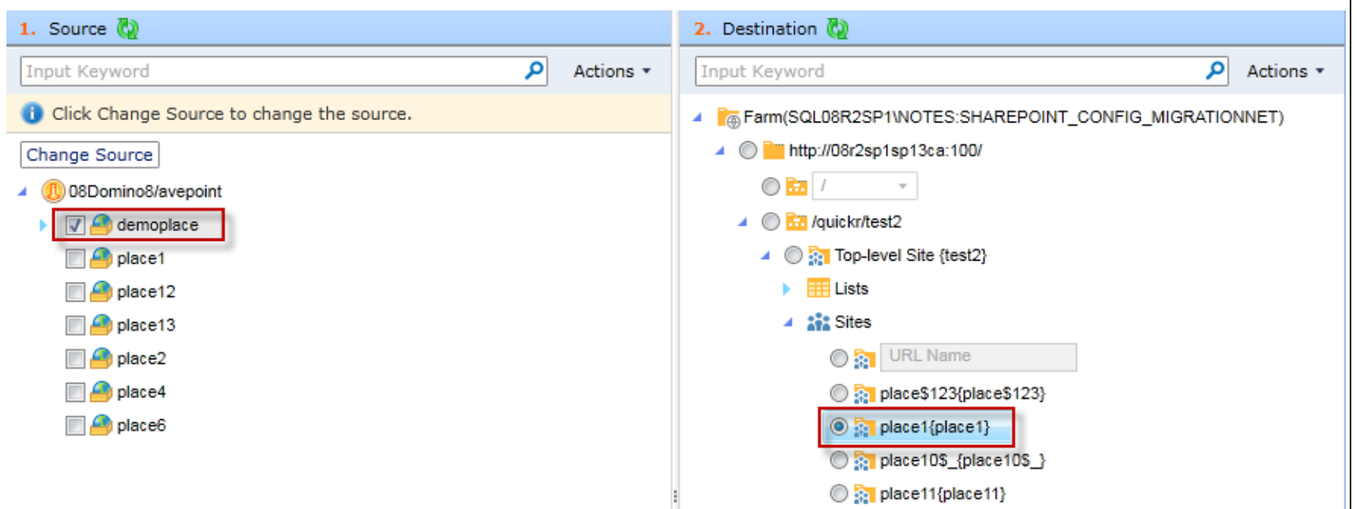
Column Name	Description	Value
FailedItemCount	It is the number of the items that are failed to be migrated.	
SkippedSiteCollectionCount	It is the number of the skipped site collections.	
SkippedSiteCount	It is the number of the skipped sites.	
SkippedListCount	It is the number of the skipped lists.	
SkippedFolderCount	It is the number of the skipped folders.	
SkippedItemCount	It is the number of the skipped items.	
FilteredOutSiteCollectionCount	It is the number of site collections that are filtered out.	
FilteredOutSiteCount	It is the number of sites that are filtered out.	
FilteredOutListCount	It is the number of lists that are filtered out.	
FilteredOutFolderCount	It is the number of folders that are filtered out.	
FilteredOutItemCount	It is the number of items that are filtered out.	
ExceptionSiteCollectionCount	It is the number of site collections that are migrated with exception.	
ExceptionSiteCount	It is the number of sites that are migrated with exception.	
ExceptionListCount	It is the number of lists that are migrated with exception.	
ExceptionFolderCount	It is the number of folders that are migrated with exception.	
ExceptionItemCount	It is the number of items that are migrated with exception.	

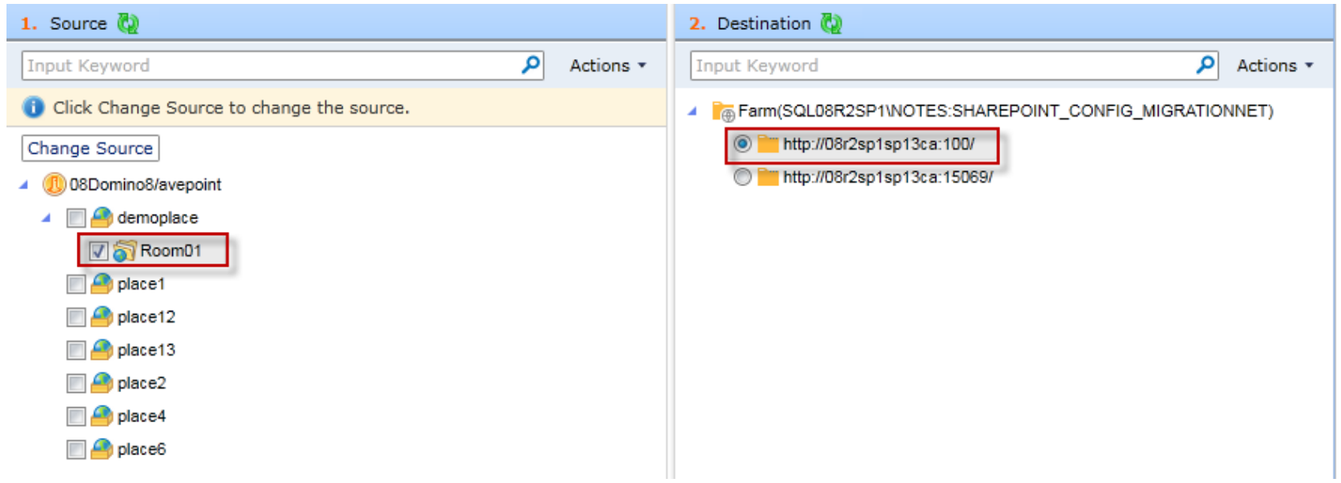
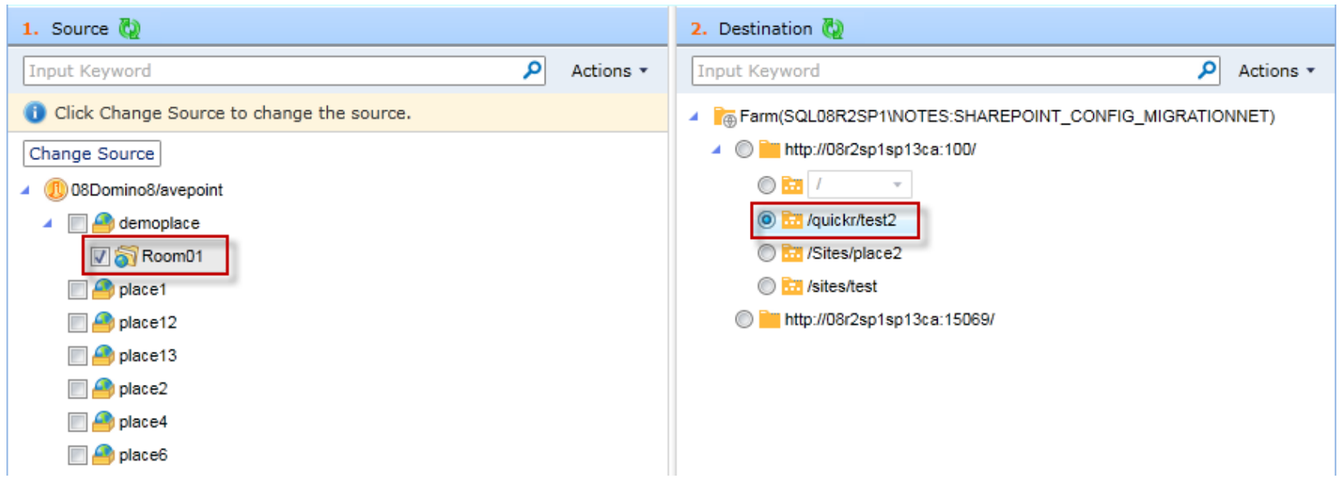
Appendix B: Quickr Migrator Customization Support Table

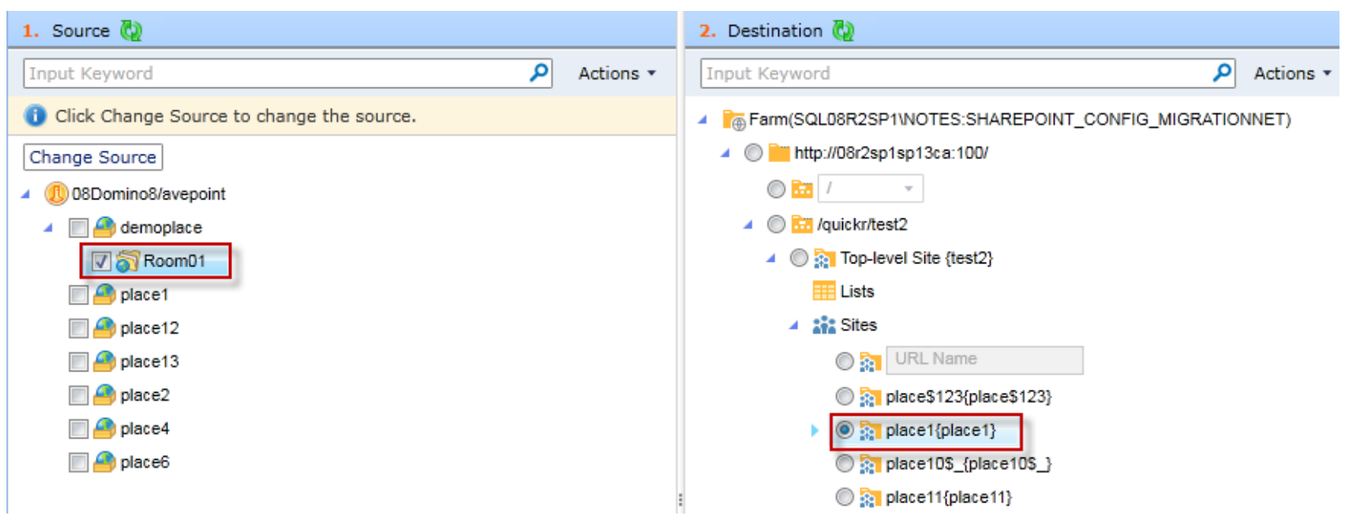
The following table shows what kinds of source node are supported to be migrated to the corresponding destination nodes

√ means the migration is supported.

Migrate To / **What to Migrate**	Web Application	Site Collection	Site	List	Folder	**Note**	**What to select when migrating**
Place		√	√			**Place – Web Application** The source place is migrated to a site collection of the selected Web application. **Place – Site Collection** The source place is migrated to a site of the selected site collection. **Place – Site** The source place is migrated to a child site of the selected site.	**Place – Web Application** 

Migrate To / What to Migrate	Web Application	Site Collection	Site	List	Folder	Note	What to select when migrating
							Place – Site Collection  **Place – Site** 

Migrate To / What to Migrate	Web Application	Site Collection	Site	List	Folder	Note	What to select when migrating
Room		√	√			**Room – Web Application** The source room's place is migrated to a site collection of the selected Web application. The source room is migrated to a site of the site collection named by the source place. **Room – Site Collection** The source room's place is migrated to a site of the selected site collection. The source room is migrated to a child site of the site collection named by the source place. **Room – Site** The source room's place is migrated to a child site of the selected site. The source room is migrated to a child site of the child site named by the source place.	**Room – Web Application**  **Room – Site Collection** 

Migrate To / What to Migrate	Web Application	Site Collection	Site	List	Folder	Note	What to select when migrating
							Room – Site 

Appendix C: Quickr Migrator Configuration File

You are allowed to manage Quickr Migration functions by configuring the attribute of the corresponding node in the **QuickrMigrationWorker.xml** configuration file. Navigate to to …*AvePoint**DocAve6**Agent**data**Migrator**QuickrSettings**ConfigurationFile* on the machine where the source DocAve Agent is installed and find the **QuickrMigrationWorker.xml** file.

QuickrMigrationWorker.xml

Open the **QuickrMigrationWorker.xml** file with Notepad. Refer to the information below to configure the attribute in the **QuickrMigrationWorker.xml** file.

- **UsingSessionAddressBook** – This node allows you to choose the method to retrieve the Domino Server.
    - **True** – **True** means Quickr Migrator retrieves the Domino Server from Address Book.
    - **False** – **False** means Quickr Migrator retrieves the Domino Server from the attributes of **DominoServer** and **DirectoryDatabasePath**. If no attribute is defined for **DominoServer** or **DirectoryDatabasePath**, Quickr Migrator retrieves the Domino Server from **names.nsf** database of the local Domino Server.
- **DominoServer** – The Domino Server name.
- **DirectoryDatabasePath** – The relative path of the Domino Server's **names.nsf** database. If the names.nsf database resides in …*notes**data*, enter **names.nsf**. If the names.nsf database resides in …*notes**data**test*, enter **test\names.nsf**.
- **ServerItem** – Enter the name of the Domino Server that will be loaded when selecting the source, or the IP address of the server where the Domino Server resides.
- **QuickrFormColumn** – This node allows you to define the name of the field from which the form name is retrieved.
- **ShowResponseTo** – This node allows you to choose whether to migrate the Response To field.
    - **False** – **False** means the Response To field will not be migrated to the destination in the migration job
    - **True** – **True** means the Response To field will be migrated to the destination in the migration job.
- **IsCheckVersion** – This node allows you to choose whether to check the version of Quickr when configuring a Quickr connection.
    - **False** – **False** means the version of Quickr will not be checked when configuring a Quickr connection.

- **True** – **True** means the version of Quickr will be checked when configuring a Quickr connection.

- **PerformanceLogDisable** – This node allows you to choose whether to collect the performance log.
  - **False** – **False** means the performance log will be collected when performing Quickr migration jobs. The performance log file will be generated in the folder that is named by Job ID and the folder is within…*AvePoint**DocAve6**Agent**jobs*.
  - **True** – **True** means the performance log will not be collected when performing Quickr migration jobs.
- **UpdateContentType** – This node allows you to choose whether to allow SharePoint existing content types to be updated if an existing content type is specified in Content Type Mapping.
  - **False** – **False** means the existing SharePoint content type will not be updated.
  - **True** – **True** means the existing SharePoint content type will be updated and the Quickr form will be mapped to the content type.
- **MigrateFormToSiteContentType** – This node allows you to choose whether to migrate the source form to SharePoint site content type.
  - **False** – **False** means the source form will not be migrated to the site content type but will be migrated to the list content type.
  - **True** – **True** means the source form will be migrated to the site content type.

  ***Note**: When you choose SharePoint Online as the destination environment, the source form will be migrated to the site content type regardless if the value of **MigrateFormToSiteContentType** is **False** or **True**.
- **CreateNewContentType** – This node allows you to choose whether to create a new site content type for the source form when the site content type name already exists in the destination.

  ***Note:** This only takes effect when the value of **MigrateFormToSiteContentType** is **True** or the destination environment is SharePoint Online.
  - **False** – **False** means no new site content type will be created for the source form. The existing site content type will be updated and the fields of the source form will be added to the existing site content type.
  - **True** – **True** means a new site content type will be created for the source form. The new site content type is named by adding a suffix (_1, _2, …, increasing in numerical value), for example, content type_1.
- **ManagedMetadataConfig CreateNewTermIfDoesNotExist** – This node allows you to choose whether to create new terms in the destination when the source field values do not exist in the destination.

- **True** – True means Quickr Migration will create new terms in the destination when the source field values do not exist in the destination.
- **False** – False means Quickr Migration will not create new terms in the destination when the source field values do not exist in the destination.

Appendix D: Conflict Resolution

In this appendix, the detailed information of each resolution is described. View the tables below for your reference.

Container Level Conflict Resolution

Resolution	Object	Conflict	No Conflict
Skip	Configuration	Ignore the conflicting configuration and do nothing on the destination.	A new SharePoint object will be created.
	Security	Ignore the conflicting security and do nothing on the destination.	A new SharePoint object will be created.
Merge	Configuration	Merge the settings in the destination node with settings from the source node.	A new SharePoint object will be created.
	Security	Permissions – Source permissions that do not already exist in the destination node will be added to the destination node. Permission Levels – the permission levels that do not already exist in the destination node will be added to the destination node. The permission levels that already exist in the destination node will not be replaced.	A new SharePoint object will be created.

Content Level Conflict Resolution

Resolution	Object	Conflict	No Conflict
Overwrite	Content	Delete the conflicting content on destination first and overwrite it with the source content.	A new SharePoint object will be created.

Resolution	Object	Conflict	No Conflict
Skip	Content	Ignore the conflicting content and do nothing on destination.	A new SharePoint object will be created.
Append	Content	The conflicting content will not be deleted; and the conflicting data will be transferred to the destination by adding a suffix (_1, _2… increasing in numerical value).	A new SharePoint object will be created.

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